LIHEAP
VERSION 4.0

USER MANUAL

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Introduction

SYSTEM DESIGN

LIHEAP Online is a secure, web-based system developed to manage and deliver LIHEAP utility assistance programs, accessible by all state and agency staff through an Internet connection. The system allows for the secure sharing of client and program data in real-time and allows information to flow easily between state and agency offices. The LIHEAP program is typically customized for each customer so the screenshots and features may differ slightly.

SYSTEM ACCESS

Login

Please access the website provided by the system administrator and login using a secure user name and password. If a user has not yet registered, please contact the system administrator to create an account. The user will see the specified server name at the top center of the login screen so that the user can readily identify whether they are in the production or test system.

Figure Login Screen

Logout

To log out of the system, click Logout on the top right corner of the page, then the LIHEAP Online page will be closed.

Figure Logout Screen

SYSTEM REQUIREMENTS

Browser Compatibility

LIHEAP is currently supported on the Internet Explorer browser versions 8, 9 and 10. No other browsers are supported at this time.

Add-Ons

When printing reports the system will automatically request the user download Crystal Reports. This is an automated download so the user simply has to accept the download. Once accepted they can view and print reports.

Client Management

.1. Allocation and Balance

This is the first screen seen after login. Select the allocation you wish to access and click ***Save***. You will them be taken to the main menu where you will see a Bulletin where the system administrator can post any important notifications.

.2. The Client List / Searching For Clients

The entire client list is shown on this page. The user can use the search conditions to narrow the client list. The user simply enters relevant information or selects an entry from the available pick list in the top row in each of the client list columns and then clicks on the binocular icon. The user can select multiple entries to narrow the search function further. At the bottom of the Client List screen the user will find the total number of records and the number of pages specified along with a page scrolling functionality.

If you input more than one search condition, the search result will be the combination of all conditions selected. Once you have selected the criteria, press the binocular icon button under the **First Name** column.

Client ID= Client ID number

First Name = First name of the client

Last Name = Last name of the client

Street = Client’s street address

City = Client’s city

Parish = Client’s parish

Phone = Client’s phone number

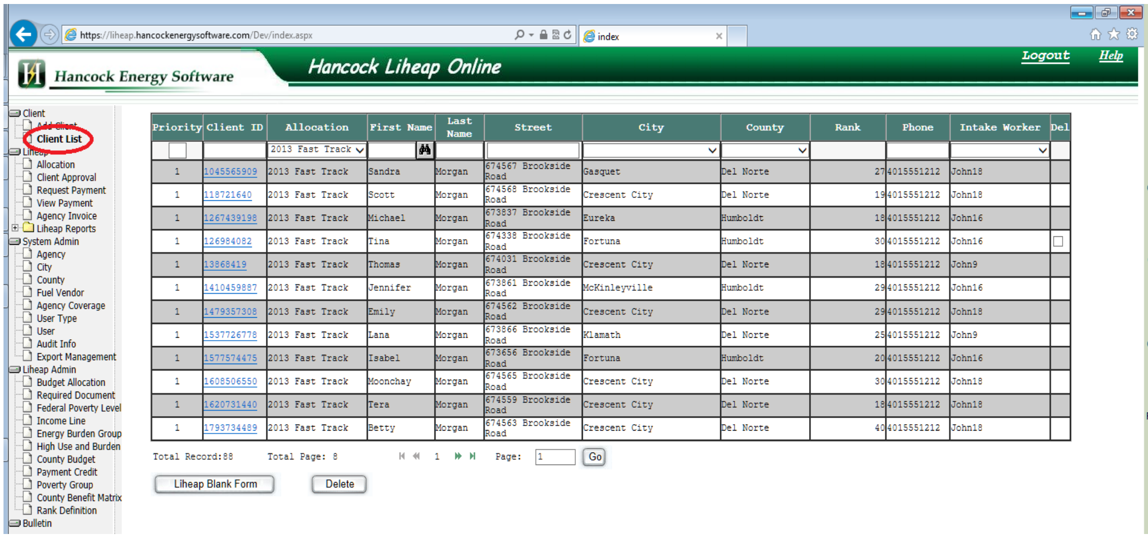


Figure Client List

.3. Add Client

To add a Client, login as an agency user and then click the ***Add Client*** menu item link on the following screen. This will open a blank ***Client Information*** screen.

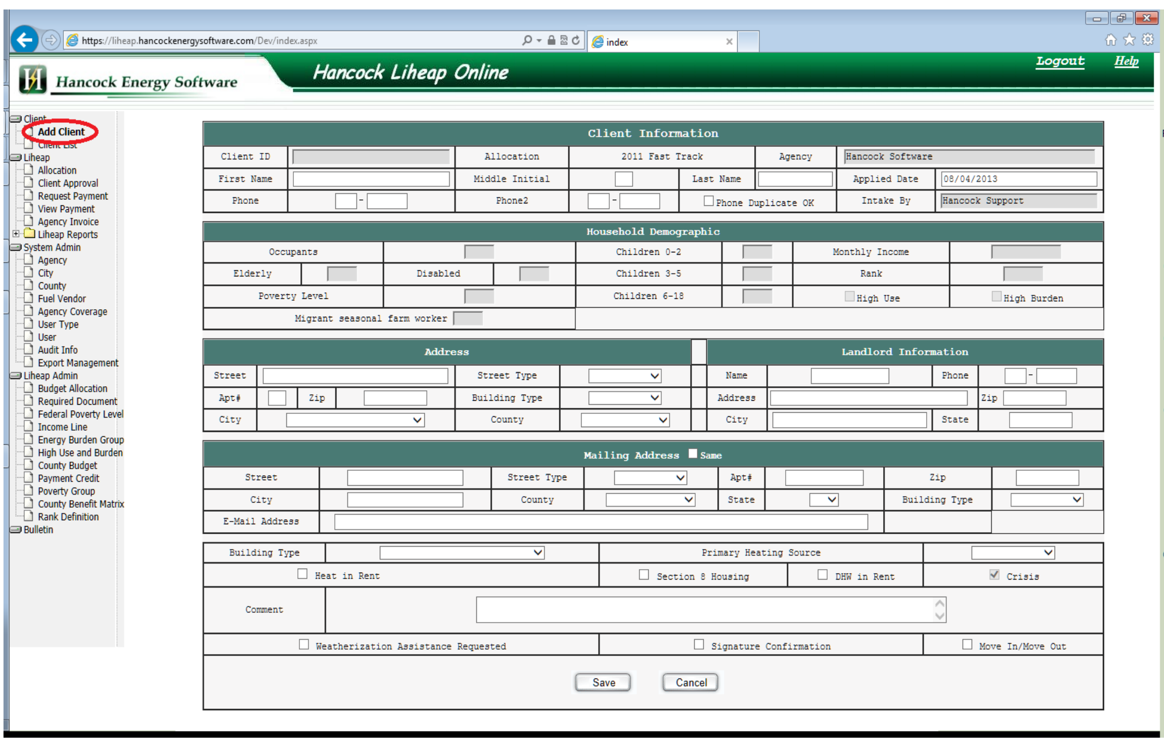


Figure Client Information

After inputting all necessary information, please click the ***Save*** button. Then the new client will be added to the system. The critical fields are client ID, which is the head of household's social security number, the city, (from the pick list), and the parish, (from the pick list). Other fields include address, phone number(s), mailing address, landlord information, building type, and primary fuel source. A row exists for entering information on client vulnerability. Please check the pick box if vulnerability is established for this household. Enter appropriate information in the ***How*** and ***Whom*** fields. Also, select the means by which the letter was delivered from the pick list. Options are between ***Hand Delivered*** and ***Mailed***. **No dashes are entered for phone numbers and social security numbers.**

When all client application information is entered into the ***Client Information***, ***Fuel Usage***, ***Family***, ***Income, Document*** and ***Employment*** screens, the user will return to the ***Client Information*** screen to click on the ***LIHEAP Benefit***, and ***WAP Rank*** buttons to update these fields. The software will calculate these fields.

If the user is entering a crisis application record, please click on the ***Crisis*** check box to insure the record will be saved properly. The user will then be able to directly enter the crisis benefit amount into the ***Benefit*** field**.** The ***LIHEAP Benefit*** button will be "grayed out" under these circumstances.

Note, all pick lists include an empty selection at the top of the list to be selected when editing existing selections that need to be deleted.

.4. Eligibility

Eligibility is determined based on the household income for the size of the family in the household The income amounts are entered in the ***Income*** screen explained later. Also, the household cannot be serviced more than once within a specified time period. This time period is defined on the ***Benefit Allocation*** screen (specific to the allocation).

Requirements

Before a client can be eligible for a benefit all required information must be collected. This includes the basic client information, fuel usage, family members and income. Additionally, the ***Document*** screen must be filled out to show that all required documents have been received.

Priority Rank

A priority rank of 1 means the client is eligible. A priority rank of -1 means the client is not eligible and a priority rank of 0 means the client is incomplete.

.5. Client Information

This is the same screen seen when adding a new client. To Edit ***Client information***, select the client that you would like to update from the ***Client List*****.** This will open the current ***Client Information*** page. The ***Client Information*** page is where the client demographic and house information are entered. To save the update, press the ***Save*** button on this page.

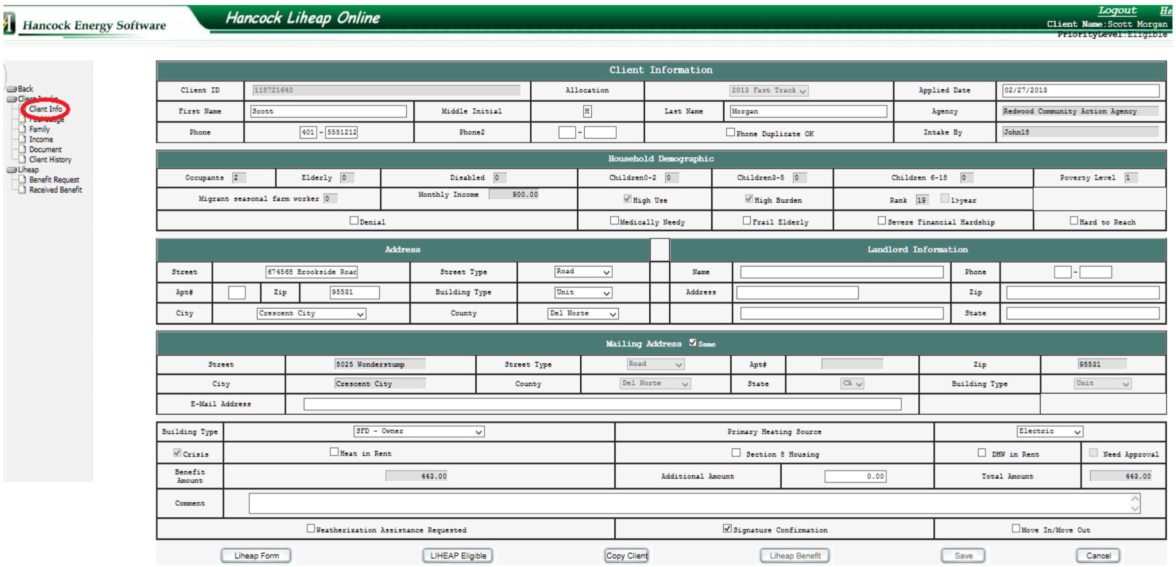


Figure Client Info

.6. Fuel Usage

As long as you have added a client or chosen a client, you can modify client fuel usage from the following page. The ***Fuel Usage*** button opens the form ***Energy Consumption Information***. The user should enter information into the utility, account number, energy cost, utility allowance, and fuel type fields.

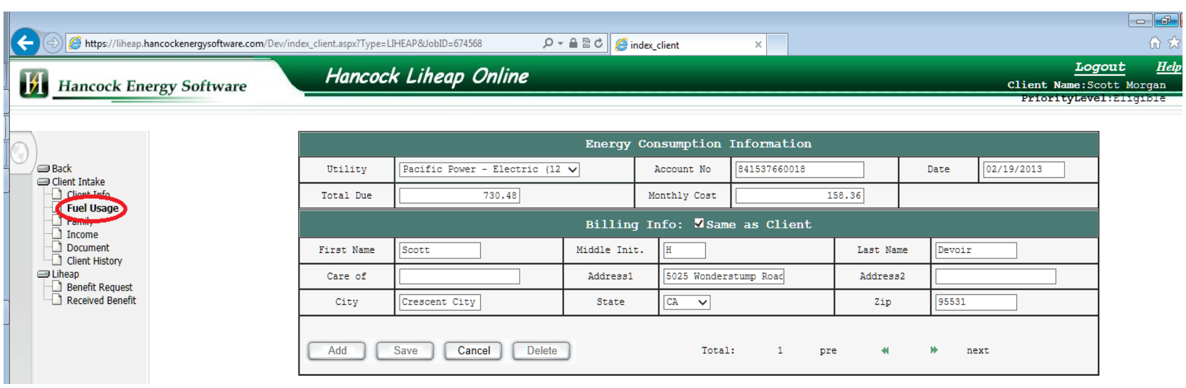


Figure Fuel Usage

.7. Family (household)

The ***Family*** screen is used to record a client's family information. You can add or delete a family member's information on this screen. The following are the required data fields: birthday, social security number, and disability. These fields will impact benefit calculations. The remaining fields are important in the specification of demographics for the household and are necessary CSBG data collection points.

The birthday must be entered as xx/xx/xxxx. Failure to follow this format will result in a prompt pop up message to correct to this format. Entering the birthday of the family member will allow the software to populate the proper age category to the right of the screen. **The user does not directly enter the age category information.**

The initial family member screen will default to the head of household entered on the ***Client Information*** screen, carrying over the first name, last name, and social security number**.**

The user will click on the ***Add*** buttons throughout the software screens to add additional records. ***Add*** buttons are not for saving edited information. Use the ***Save*** buttons to save information entered into screens.

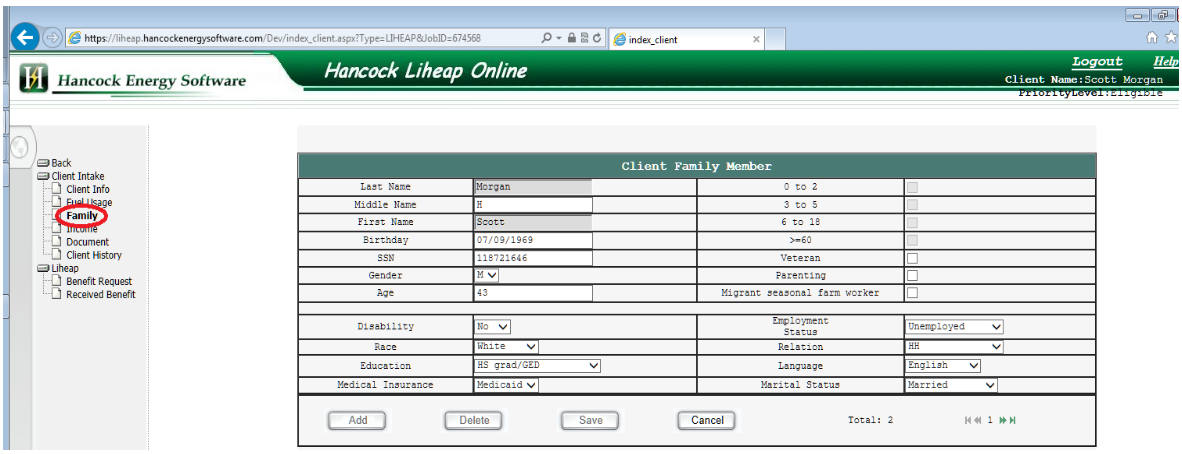


Figure Family

.8. Income

The ***Income*** screen is used to enter a client's household income information.

This screen is where all income for all family members is entered. Each family member can be selected from the populated column on the left of the screen. All family members will be listed here based on the family member information previously entered. The second column has the pick list of income types to be selected as appropriate. The amount of income is directly entered by the user, and then the frequency pick list is selected. If the pick list item ***Hourly*** is selected, it is necessary to directly enter the hours per week information in the next column. The software will then calculate the total monthly household income.

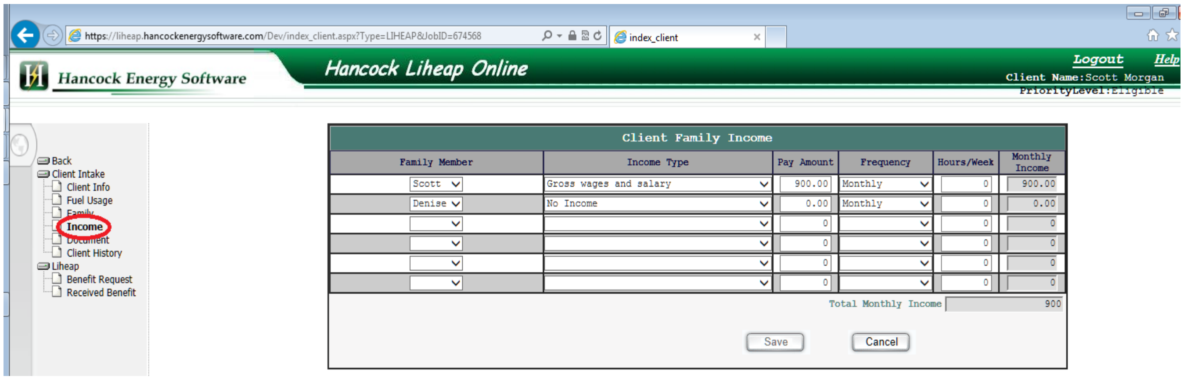


Figure Income

.9. Document

The document screen is used for the agency to check if their clients have submitted all required documents. Click on ***Complete/Not Required*** if the selected document has been submitted or is not required. All boxes must be checked for the client to be determined eligible. Once all documents have been checked, click on the ***Save*** button to save this screen's information.

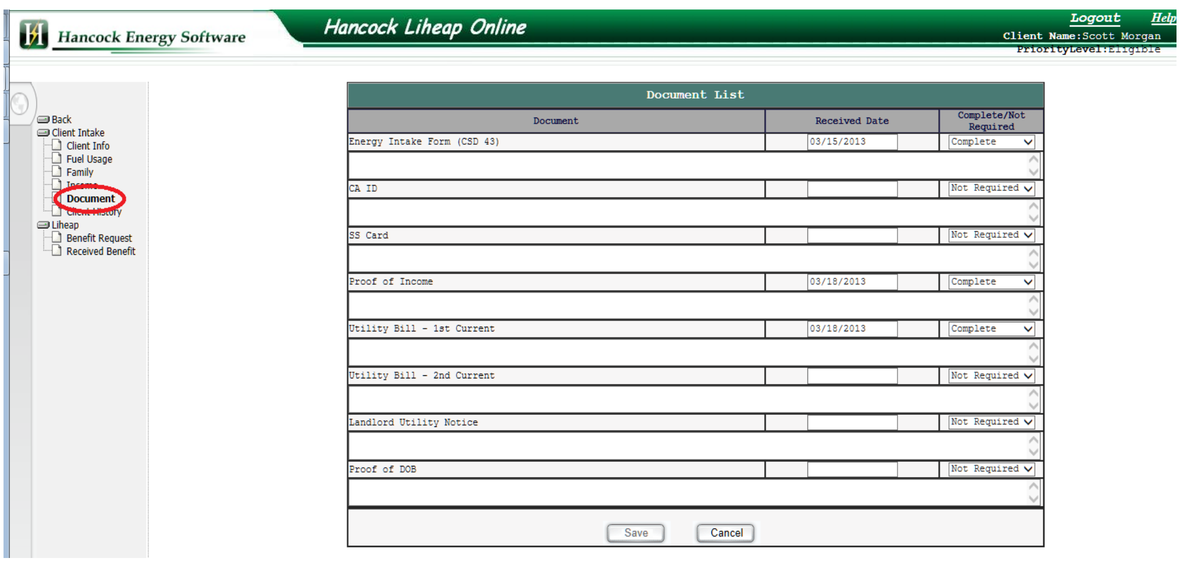


Figure Document

.10. Employment

The ***Employment*** screen is used to enter employment information for client family members who have income. You can print out an ***Employment Letter*** to confirm the accuracy of the provided information. A pick list of family members with income previously entered is at the top left of this screen. Selecting the family member(s) will carry over the appropriate fields to the employment screen. The user will directly populate the other necessary information in the fields on this screen.

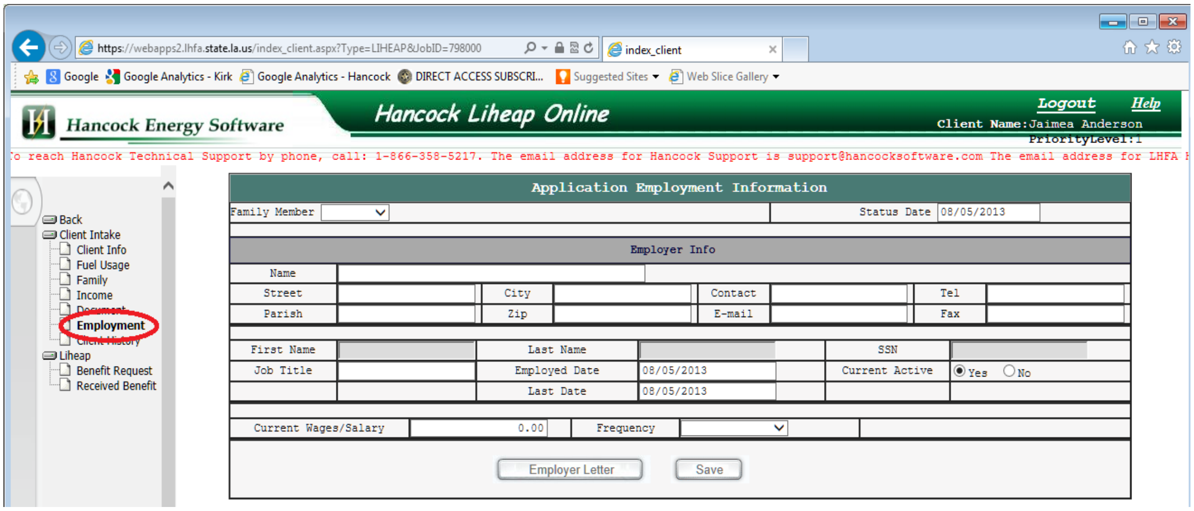


Figure Employment

.11. Client History

To view client history, click the ***Client History*** link under the ***Client Intake*** menu at the client index page**.** It will open the ***Client History*** for the selected client. All records of services provided to this client will be listed on this page.

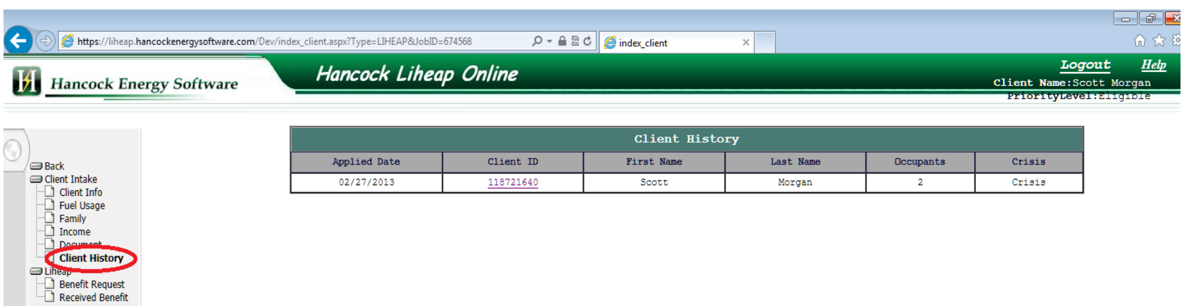


Figure Client History

.12. Benefit Request

When all client application information is entered into the ***Client Information***, ***Fuel Usage***, ***Family***, ***Income, Document*** and ***Employment*** screens, the user will return to the ***Client Information*** screen to click on the ***LIHEAP Benefit***, and ***WAP Rank*** buttons to update these fields. The software will then calculate the total benefit amount.

The ***Benefit Request*** screen is used to request the benefit for a client. The user will select from the utility pick list to the left of the screen (populated by the software from the fuel usage information previously entered by the user). The user can select any number of pick list options then directly enter the amount to be paid to that utility/account. The account number carries over from the fuel usage screen as well.

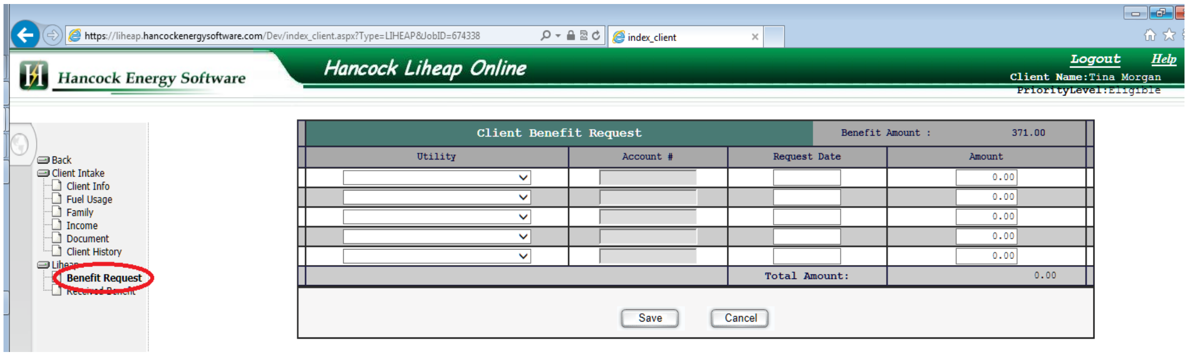


Figure Benefit Request

The user cannot enter account credit amounts that total more than the benefit level that appears in the top right portion of the screen. The software will generate a pop up message to inform the user if total benefit requests exceed the benefit level for that client. Following completion of this screen, the user can proceed to requesting payment to the utility account(s) selected.

.13. Received Benefit

This screen is to check the benefit amount received by the current client. Following requesting payment, this screen will be populated by the software with the date of the request.

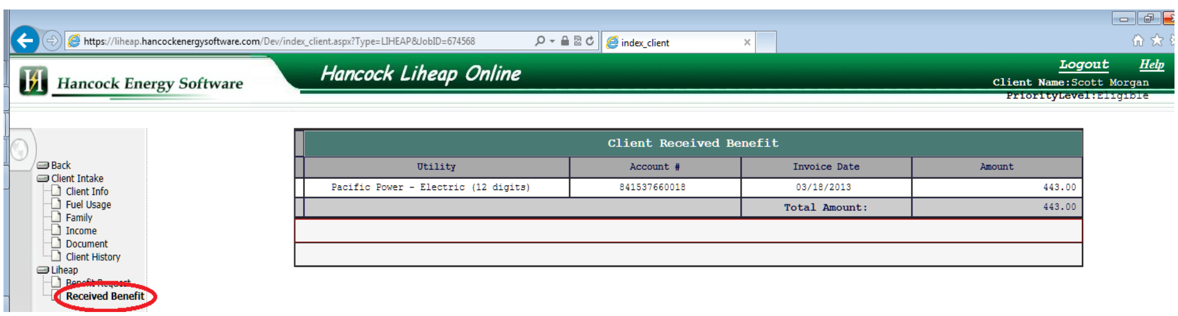


Figure Received Benefit

The user can delete the received benefit if the ***Agency Invoice*** has not been run for this payment. You can simply check the ***Del*** check box then click on the ***Delete*** button.

.14. Deleting a Client

To delete a client, go to the **Client List** page, select the client and check ***Del***, then press the ***Delete*** button on this page. The selected client and all the associated jobs for the client are deleted.

Benefits

.1. Request Payment

This screen is used to create a payment based on several conditions shown below to request payments to the utilities for which benefit amounts have been selected for specified clients. Typically the state office reviews these requests by agency and system-wide prior to generating payments to the utilities. The ***Request From*** field will default to the agency generating the report, (the user's agency). The state can run this report with this field blank to see a comprehensive list of benefit requests, or specify the agency to be reviewed. Click on the ***Run*** button to view the list of client names, addresses and payments for that time range. If the list is reviewed and approved, the agency will click on the ***Save*** button. This will then allow the agency user to review the ***View Payment*** form. If there are errors on the list, the agency user will click on the ***Cancel*** button. State administrators cannot run these lists, but can review them.

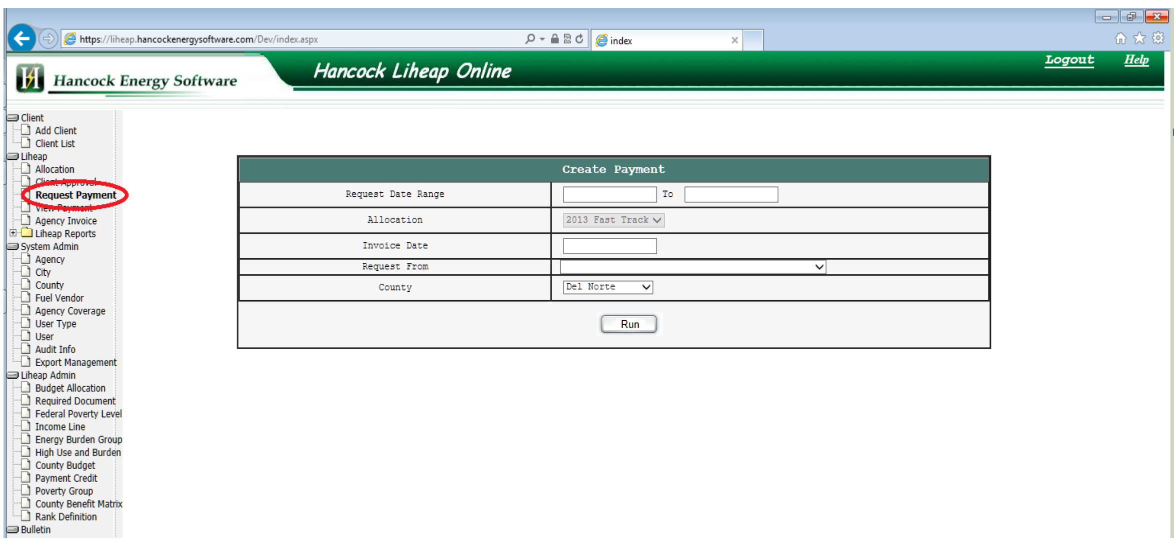


Figure Request Payment

.2. View Payment

You can view a payment that is created in ***Request Payment*.** Click on ***Run*** to view and a ***LIHEAP Payment Request*** report appears. This report by vendor can be viewed by agency and state users and it provides the basis for payments to utilities and admin payments to the agencies.

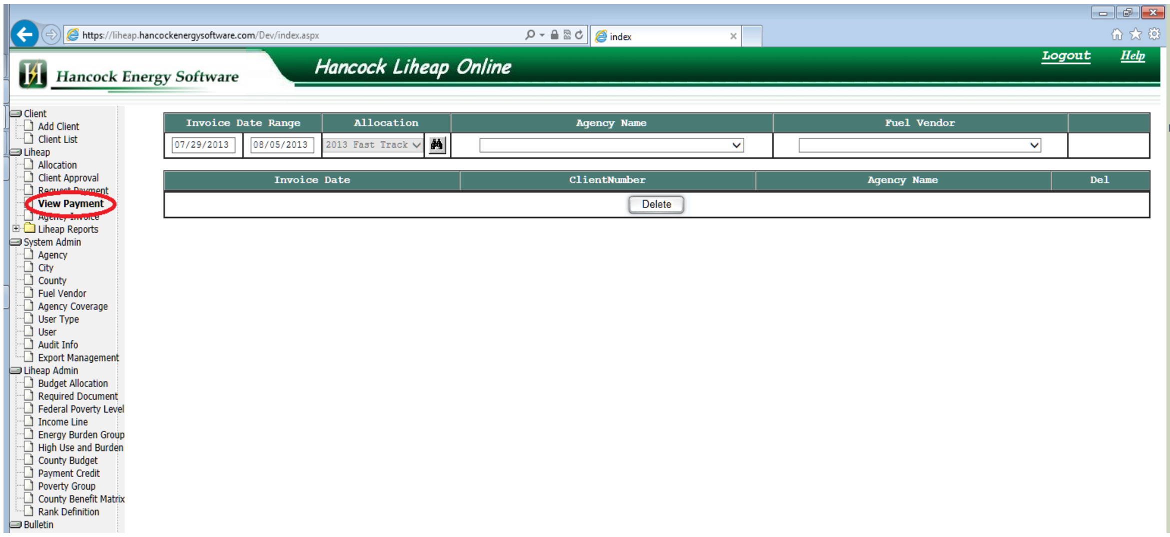


Figure View Payment

To see a list of clients, enter the desired date range, allocation, (which defaults to the current allocation), agency name, (if the user is an agency, this defaults to the user's agency), and if desired, the fuel vendor. Click on the binocular  icon button to view the invoice dates and client numbers.

.3. Agency Invoice

Once payments have been requested this function is used for agencies to create the invoice. Enter the correct date range from the ***Request Payment***, make sure the allocation is the correct program/contract and make sure the invoice date is the date for which the invoice is being generated, then click on the ***Create*** button to create an Invoice.

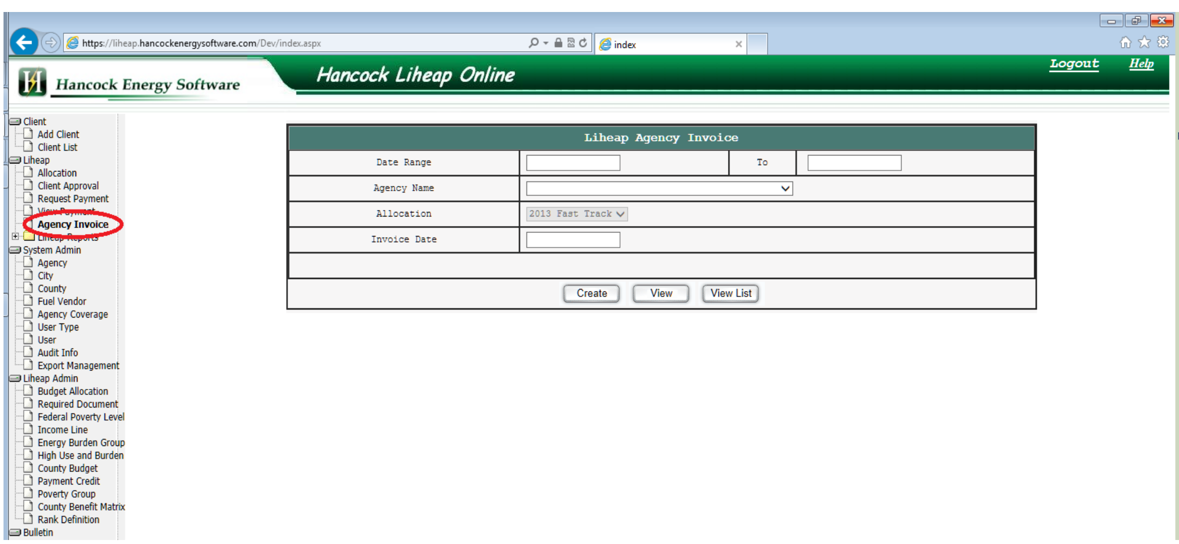


Figure Agency Invoice

After you click on the Create button, it will show a pop-up dialog box. See the following picture:

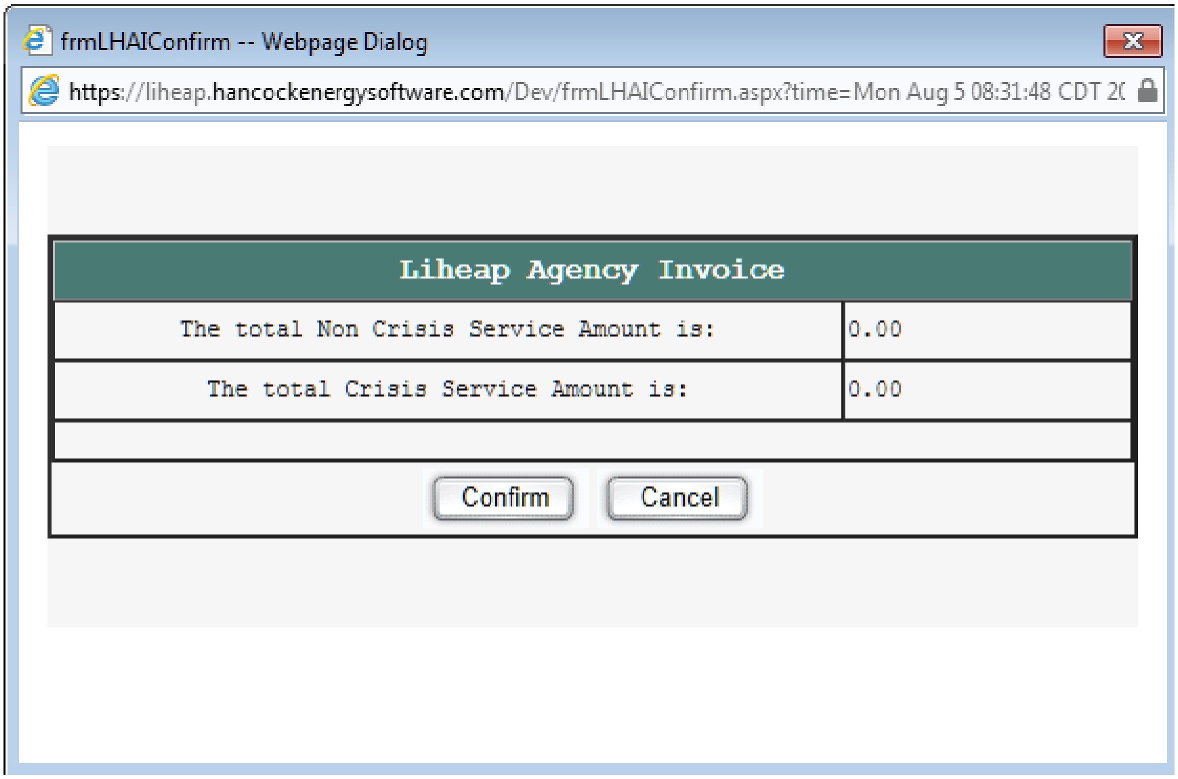


Figure Agency Invoice

If the Service Amount that shows on the screen does not match the ***Vendor Payment*** report, do not click on the ***Confirm*** button. Go back and check all the data to make sure it was entered correctly. The user may also click on the button ***View List*** to see if an invoice for the date range has been previously created.

The ***View*** button will show the same ***LIHEAP Agency Invoice*** created by clicking on the ***Create*** button. The ***View List*** button will show the same information, but in a list format.

Reporting

.1. Agency Report

You can get an agency report from this screen. Choose the report name and agency, and then click on the ***Run*** button. The agency report appears.

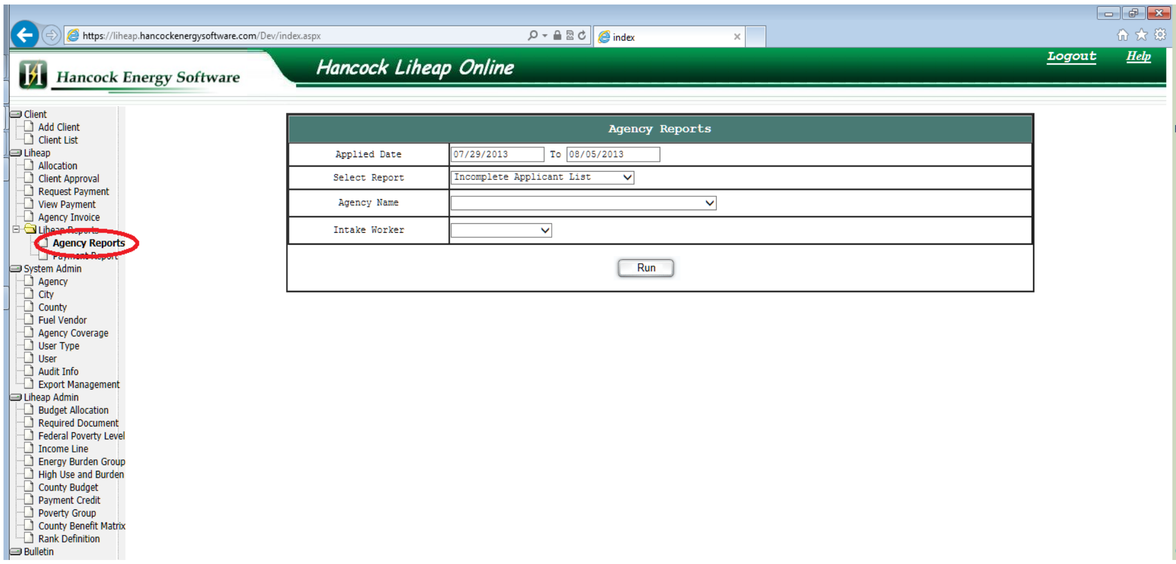


Figure Agency Reports

Incomplete Applicant List

A list of applicants whose priority level is incomplete, meaning required eligibility documentation hasn't been received.

Incomplete Letter Report

Notifies the customer of which required eligibility documents have not been received.

Client Qualification List

A list of applicants organized by allocation and showing their name, address, amount received, crisis and service date.

Applicant Denial List

A list of applicants denied based on the application process.

Applicant Denial Letter Report

A deferral letter sent to a group of deferred clients that are not eligible for the program because they are over-income.

.2. Payment Report

To run a production report, enter the desired date range (at the agency level the ***Agency*** field will default to your agency). The state administrator can run a full system-wide report by leaving the ***Agency*** field empty, or select the agency desired. Enter the desired ***Utility*** or leave this field blank and all utilities will show on the report.

To run the ***DHHS Report***, simply click on the ***DHHS Report*** button, and this formal report structured to satisfy the system administrator's reporting responsibility to the funding source is available, populated with system information as required.

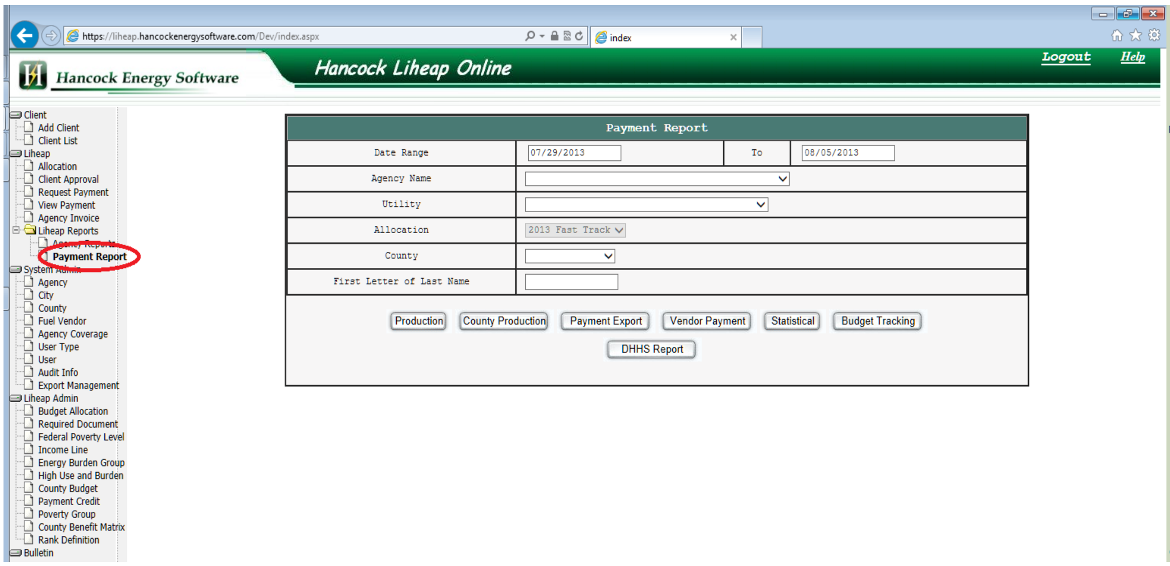


Figure Payment Reports

Production

A breakdown of assistance by utility provider including number of families, number of occupants, number of children, number of elderly and the payment amount.

Parish Production

A breakdown of assistance by parish including number of families, number of occupants, number of children, number of elderly and the payment amount.

Payment Export

A comma separated list of payments that can be sent to a vendor for upload into their system.

Vendor Payment

A report for each vendor showing the clients and the amounts paid broken out by parish.

Statistical

This report shows a statistical breakdown for both crisis and non-crisis clients by household, type of people assisted and poverty level.

Budget Tracking

Shows the contracted budget, expenditures for selected period and year-to-date and the remaining budget balance.

DHHS Report

Creates the **LIHEAP Household Report for-Federal Fiscal Year 2012--Long Form.** This report shows households assisted and number of applicant households broken out by poverty levels and vulnerable populations.

Administration and Maintenance

.1. Agency Coverage: City, Parish, Fuel Vendor

Select the radio button next to ***City***, ***Parish***, or ***Fuel Vendor*** to enter/update information for the city, parish, or fuel vendor information for the selected agency. To add a new entry use the blank line at the bottom of the screen picking selections from the drop down lists. To edit an existing record, simply update the appropriate information, and to delete a record check the ***Delete*** box to the right of the row. Once the changes are made click ***Save***.

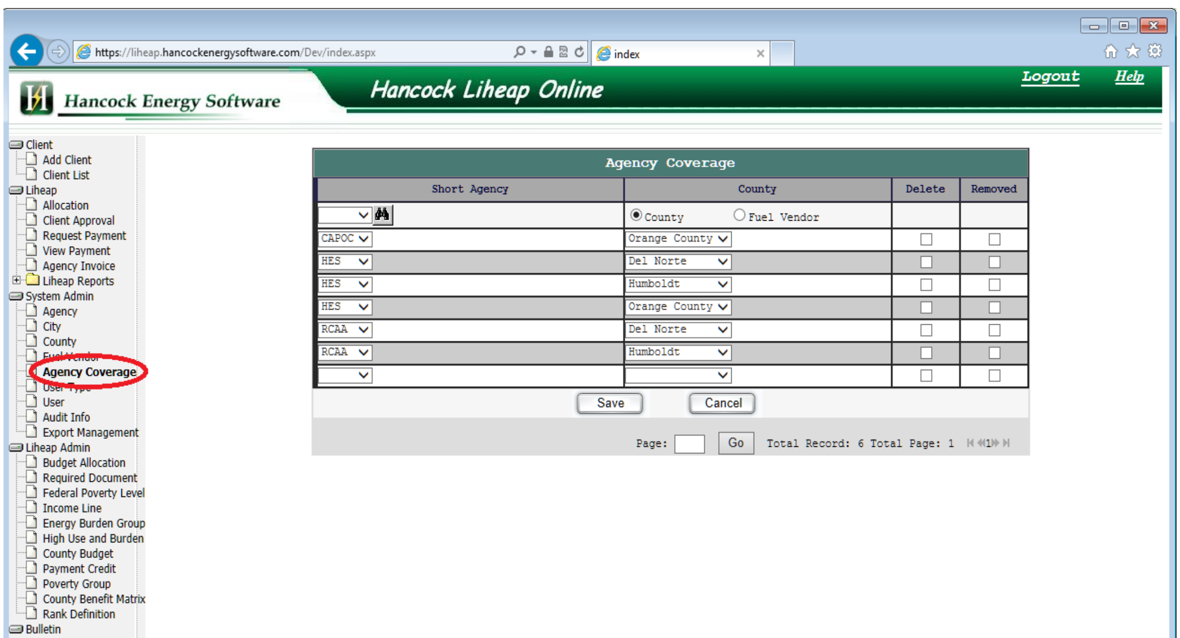


Figure Agency Coverage

.2. Users (and User Type)

Use this screen to add/update users with access to the LIHEAP system. Search for a specific user by entering their user name in the blank field under the ***User Name*** heading, and/or search for an agency by selecting the agency from the drop down list. Once entered, click the binocular  icon button. Create new records by entering the information on the blank line at the bottom of the screen. After entering/updating information click ***Save***.

The ***User Type*** comes from the ***User Type*** screen. This screen allows you to user types (roles) which define what sections and features a user has access to. Click on the ***Role Right Definition*** link. This will open the ***Role Rights*** screen where roles are defined. The ***Menu Group*** option at the top of the screen has three options, one for each of the left-hand menus, ***Top Menu*** (top level menu), ***Client Menu*** (the menu seen when you select a client record), and ***Project Menu*** (used for multi-family projects). Within each menu group select the specific screens the role has access to. Additionally, click on a screen link to drill into the details of that screen where specific buttons can be checked as visible or read only. Click the ***Save*** button on each screen to save the changes.

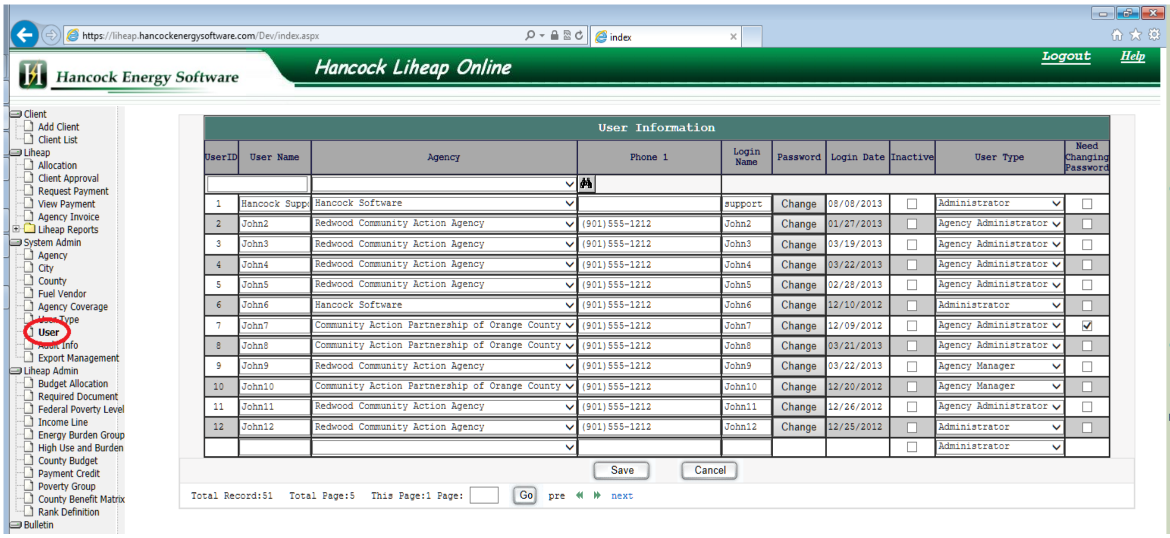


Figure User

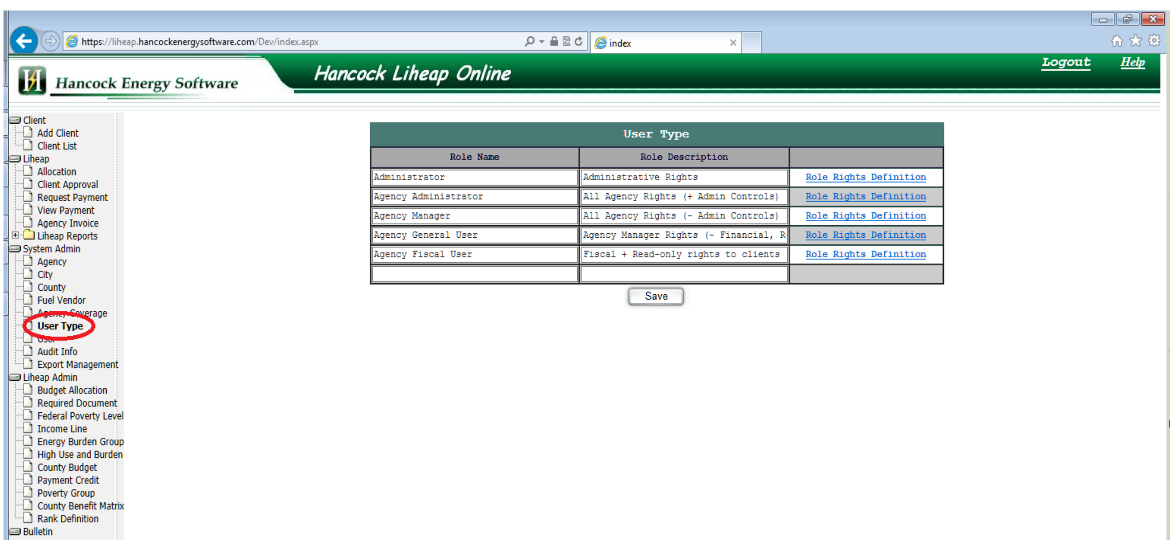


Figure User Type

.3. Funding Source

This screen is used to define the source of funding for each of the programs. Additional records can be added in the bottom blank row. Fields to the right include ***Admin Percent*** (percent of total amount paid to the agency as admin expense), ***DOE*** (funding sources overseen by the Department of Energy), and ***DHHS WAP*** (funding sources overseen by the Department of Housing and Human Services).

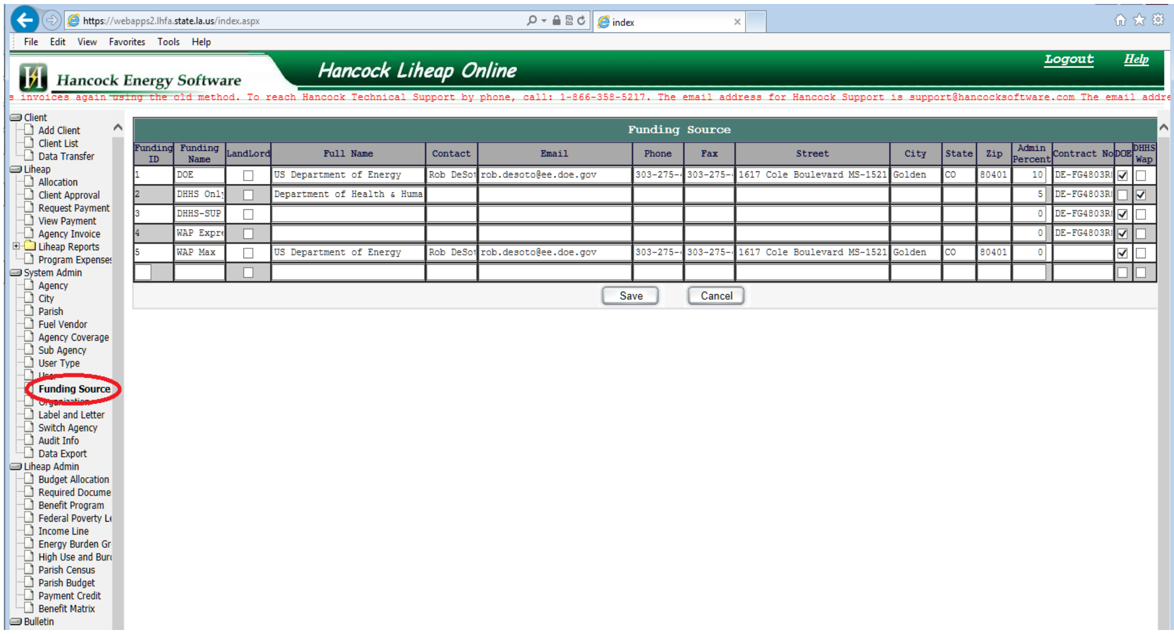


Figure Funding Source

.4. Budget Allocation

Define the start date, end date and allocation money for all parts of a budget. Additionally, enter additional benefit amounts and the minimum time period between crisis and non-crisis requests.

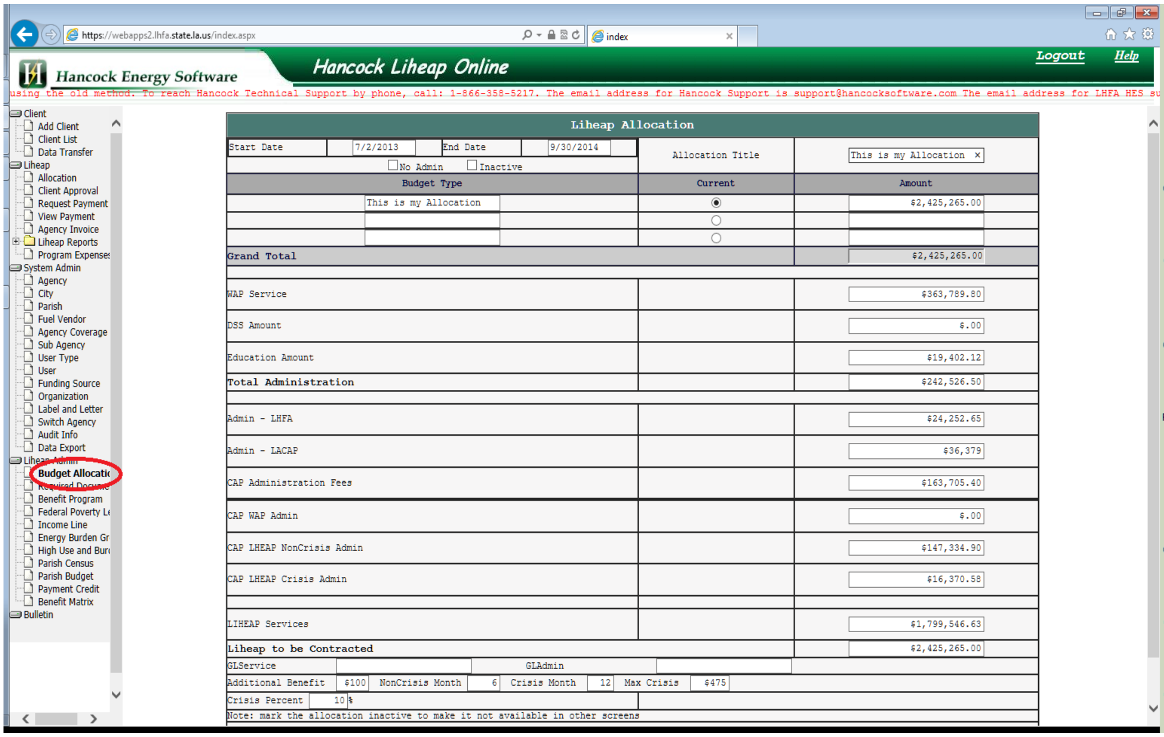


Figure Budget Allocation

.5. Federal Poverty Level

Enter the maximum Federal government's poverty level for each family size and program year.

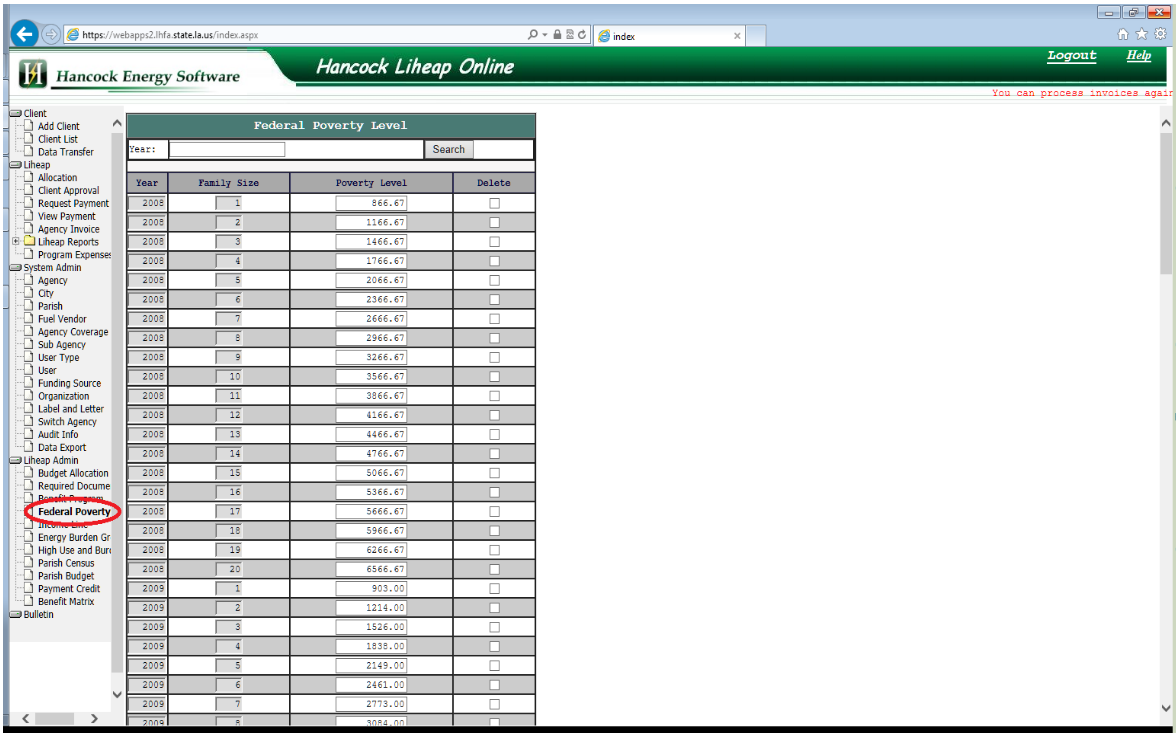
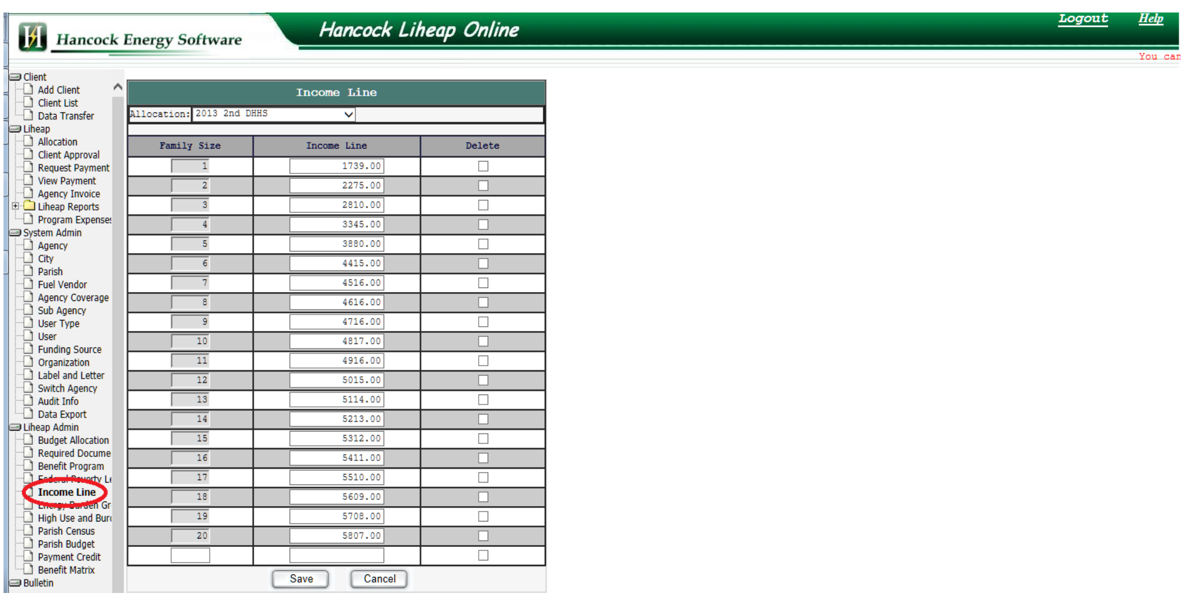


Figure Federal Poverty Level

.6. Income Line

Maximum household income allowed per family size to be eligible for benefits.



.7. Parish Census

Use this screen to record the percent of state program funds allocated to each parish.

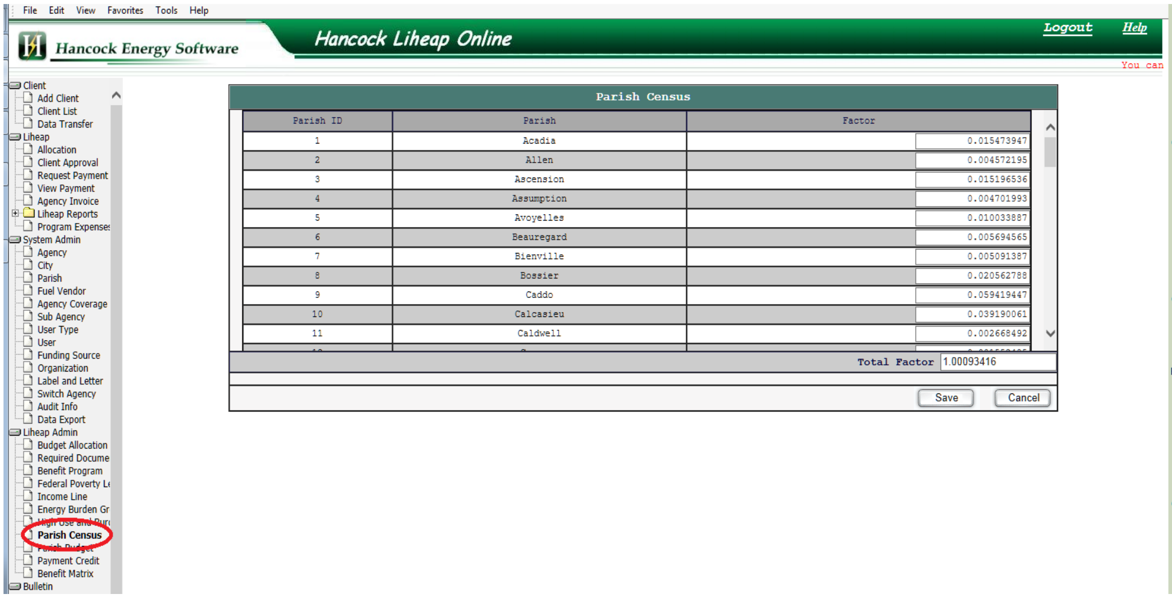


Figure Parish Census

.8. Parish Budget

Shows the percent entered into ***Parish Census*** and calculate the budget for each parish. It will also show the balance remaining within each parish.

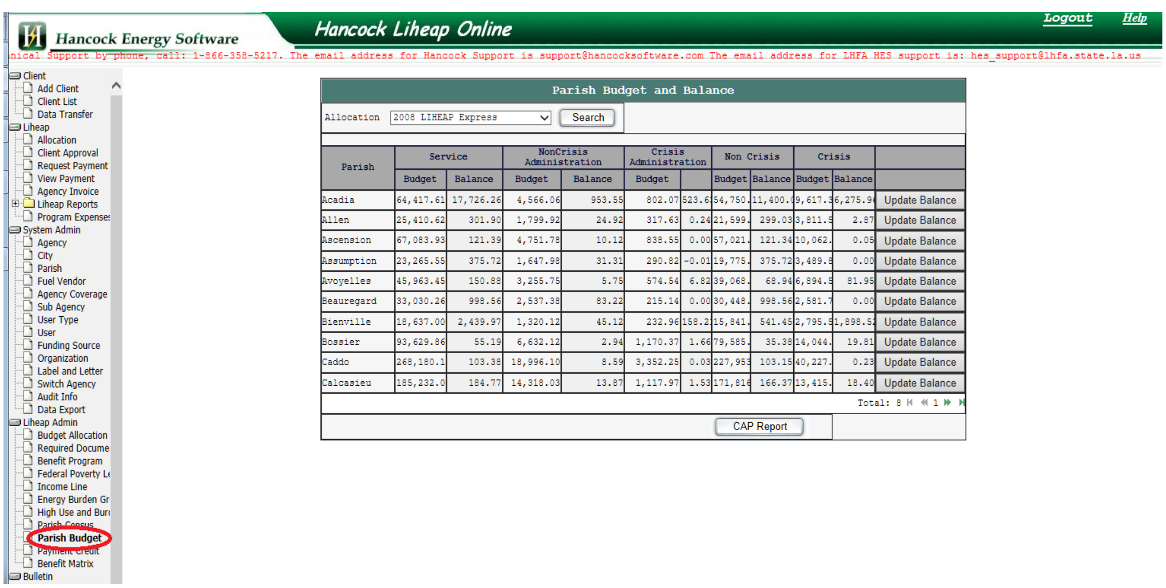


Figure Parish Budget

.9. Payment Credit

This screen is used to offset the benefit costs assigned to client accounts on payment requests that are inactive, or to recover benefits assigned to payment requests for ineligible clients.

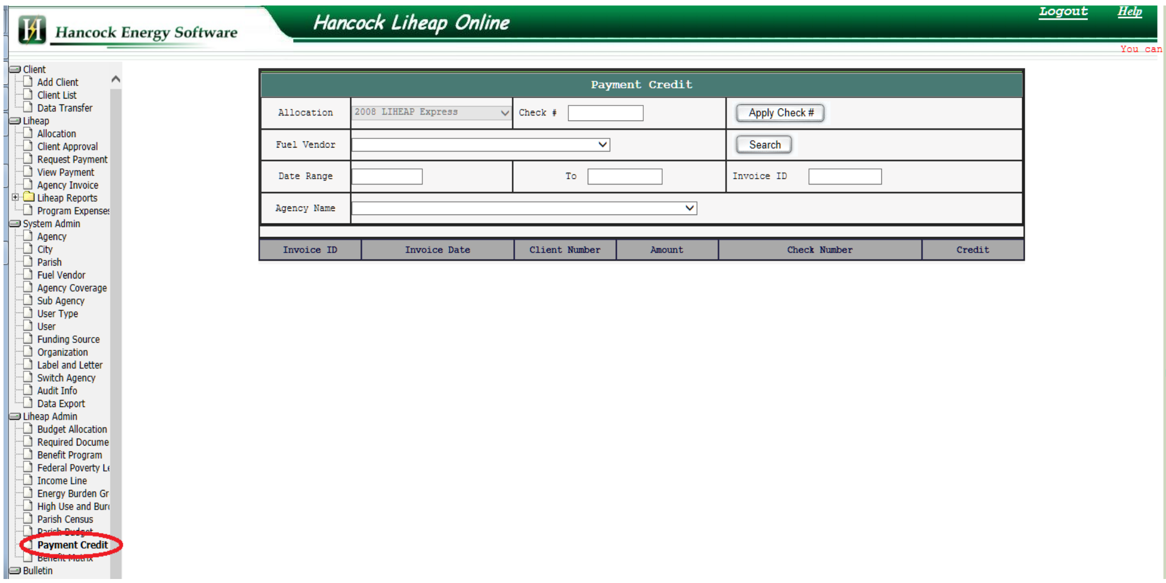


Figure Payment Credit

.10. Benefit Matrix

This screen defines the benefit amount based on the energy burden percent and the number of family members (group).in the household.

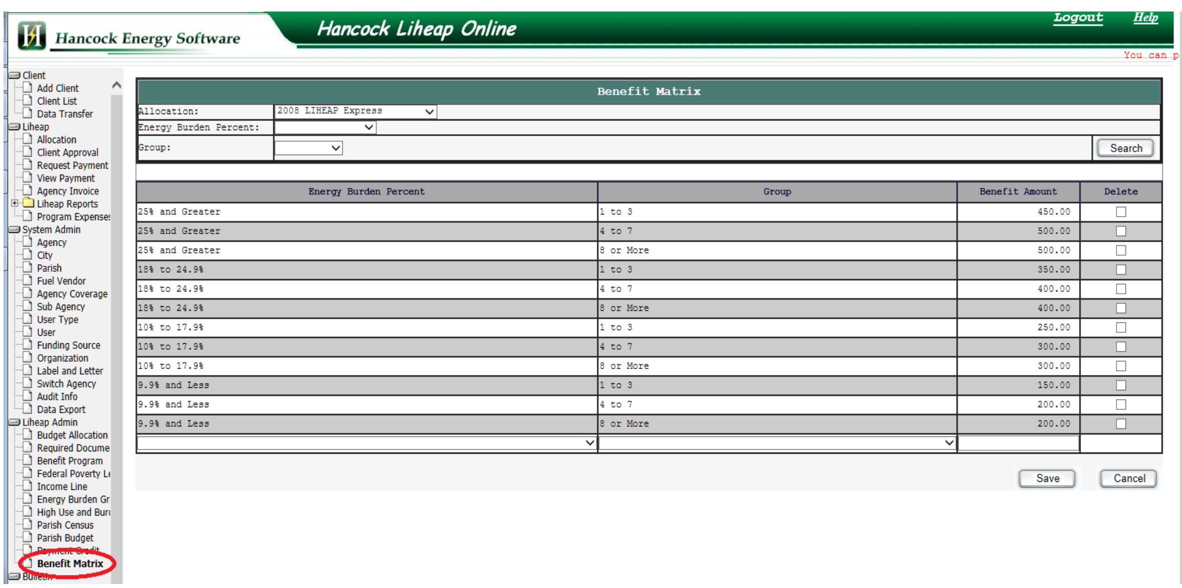


Figure Benefit Matrix